

(19) World Intellectual Property
Organization
International Bureau



(43) International Publication Date
27 February 2003 (27.02.2003)

PCT

(10) International Publication Number
WO 2003/017040 A3

(51) International Patent Classification⁷: **G06F 17/60**,
3/00, G09B 19/00

(21) International Application Number:
PCT/US2002/025488

(22) International Filing Date: 9 August 2002 (09.08.2002)

(25) Filing Language: English

(26) Publication Language: English

(30) Priority Data:
09/929,735 13 August 2001 (13.08.2001) US

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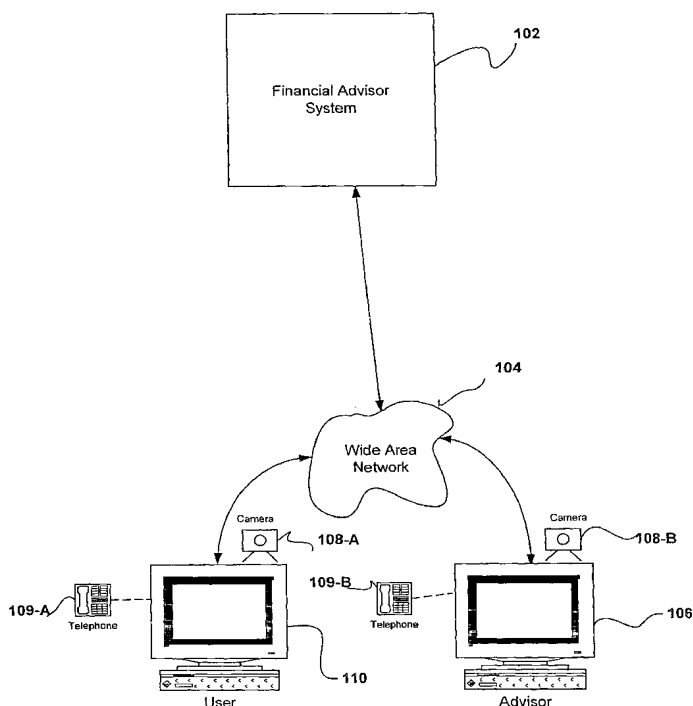
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(81) Designated States (*national*): AE, AG, AL, AM, AT, AU, AZ, BA, BB, BG, BR, BY, BZ, CA, CH, CN, CO, CR, CU, CZ, DE, DK, DM, DZ, EC, EE, ES, FI, GB, GD, GE, GH, GM, HR, HU, ID, IL, IN, IS, JP, KE, KG, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, MA, MD, MG, MK, MN, MW, MX, MZ, NO, NZ, OM, PH, PL, PT, RO, RU, SD, SE, SG, SI, SK, SL, TJ, TM, TN, TR, TT, TZ, UA, UG, US, UZ, VC, VN, YU, ZA, ZM, ZW.

(84) Designated States (*regional*): ARIPO patent (GH, GM, KE, LS, MW, MZ, SD, SL, SZ, TZ, UG, ZM, ZW), Eurasian patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European patent (AT, BE, BG, CH, CY, CZ, DE, DK, EE,

[Continued on next page]

(54) Title: COMMUNICATION INTERFACE FOR A FINANCIAL COUNSELING SYSTEM



(57) Abstract: The present invention provides a communication medium (104) for a financial modeling and counseling system (102) between a user (110) and live advisor (106). A user interface provides various communication options for the user to select from. The options include voice, talk, video, clips, email and chats as well direct access by a stand-alone telephone (109-A, 109-B). With most option the user (110) and the live advisor (106) have access to a collaborative medium where they can share data.

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ES, FI, FR, GB, GR, IE, IT, LU, MC, NL, PT, SE, SK,
TR), OAPI patent (BF, BJ, CF, CG, CI, CM, GA, GN, GQ,
GW, ML, MR, NE, SN, TD, TG).

(88) Date of publication of the international search report:
22 January 2004

Published:

— with international search report

For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

INTERNATIONAL SEARCH REPORT

International application No.

PCT/US02/25488

A. CLASSIFICATION OF SUBJECT MATTER

IPC(7) : G06F 17/60, G06F 3/00, G09B 19/00

US CL : 345/854, 434/350, 705/8, 705/26, 705/35, 705/36, 706/45

According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

U.S. : 345/854, 434/350, 705/8, 705/26, 705/35, 705/36, 706/45

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)
EAST-USPAT, PGPUB, EPO, JPO, DERWENT, DIALOG, PROQUEST, YAHOO, GOOGLE

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	Business Editors & High-Tech Writers, Kana and Weblin Team to Provide Industry's Most Comprehensive Online Customer Interaction Solution, Business Wire; New York; April 20, 1999, pgs 1-3.	1-24
X	Business/Technology Editors, Weblin Communications Unveils New Customer Interaction Software Suite for Enabling Interactive E-Commerce and Customer Service; Business Wire; New York; April 20, 1999, pgs 1-3.	1-24
X	Campbell, Tricia; Get plugged in: Service with a:-); Sales and Marketing Management; New York: Mar 1999; pages 62-68, especially pages 67-68, under the head "Soundstone.Com Digital Tools, Personal Service".	1, 9, and 17

☐ Further documents are listed in the continuation of Box C.

☐ See patent family annex.

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"O" document referring to an oral disclosure, use, exhibition or other means	"&" document member of the same patent family
"P" document published prior to the international filing date but later than the priority date claimed	

Date of the actual completion of the international search

08 March 2003 (08.03.2003)

Name and mailing address of the ISA/US

Commissioner of Patents and Trademarks
Box PCT
Washington, D.C. 20231

Facsimile No. (703)305-3230

Date of mailing of the international search report

23 JUN 2003

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INTERNATIONAL SEARCH REPORT

PCT/US02/25488

Continuation of Item 4 of the first sheet:

Examiner suggests the following title to conform to PCT Rule 4.3:

"COMMUNICATIONS INTERFACE FOR A FINANCIAL COUNSELING SYSTEM"